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Jasper, Scott

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The Islamic State is a Hybrid Threat: Why Does That Matter?

By [*Scott Jasper*](#) and [*Scott Moreland*](#)

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The Islamic State is a Hybrid Threat: Why Does That Matter?

Scott Jasper and Scott Moreland

The Islamic State (IS), also known as ISIS or ISIL, has garnered international condemnation for its brutal military and genocidal campaigns under ethnic and religious auspices. Their ‘shock and awe’ style in Syria and Iraq caught the region and the world by surprise. Since the summer, US warplanes have conducted nearly 870 strikes on militant targets in those countries.^[i] However the [resignation](#) of the US Secretary of Defense is indicative of the difficulty in articulating strategies to defeat this extremist movement. The administration is looking for a chance to reset its foreign policy and approach to the war. ^[ii] Understanding how the Islamic State fits the profile of a hybrid threat is integral to the development of unified strategies to counter them.

Hybrid Threat Characteristics

The Islamic State’s transnational aspirations, blended tactics, structured formations, and cruel use of terror as part of their arsenal can be described a hybrid threat. In September of this year, US President Barack Obama supported this terminology when he warned that the Islamic State represented a new type of challenge; a ‘sort of a hybrid of not just the terrorist network, but one with territorial ambitions, and some of the strategy and tactics of an army.’ ^[iii] Although there is not a universal definition for a hybrid threat, [NATO](#) uses the term to describe ‘adversaries with the ability to simultaneously employ conventional and non-conventional means adaptively in pursuit of their objectives.’ ^[iv]

The notion of a hybrid threat has been debated since it entered into the defense lexicon. Detractors argue that it is simply the latest term for irregular or asymmetric methods used to counter a conventionally superior foe. Indeed, throughout history insurgents and even nation-states have deployed creative mixes of conventional and irregular capabilities to achieve their end states. Critics further maintain that the term hybrid threat is too abstract to be meaningful and risks becoming a catchall phrase for all non-linear threat actions.^[v] To further confuse the issue, similar terms are even applied to friendly formations. For example, the US Army’s Special Operations Command advocates for ‘hybrid organizations and structures, which combine the mission command for special operations and conventional forces.’ ^[vi]

Supporters of a hybrid threat concept counter that contemporary threat actors are creating a new type of warfare through the employment of 21st century technologies and communications networks, unrestricted operational art, and novel combinations of conventional and non-conventional capabilities that are distinct from traditional irregular warfare methods.^[vii] Frank G. Hoffman, a leading proponent for developing a concept for countering hybrid threats, was among the first to propose clear hybrid threat characteristics

that might be meaningful and useful to planners:[viii]

- Blended modalities. Hybrid threats use a combination of conventional and non-conventional tactics combined with terrorism and criminal activities.
- Simultaneity. Hybrid adversaries can employ different modes of conflict simultaneously in a coherent way.
- Fusion. Hybrid threats are comprised of a mix of professional soldiers, terrorists, guerrilla fighters, and criminal thugs.
- Criminality. Hybrid threats use criminal activity to sustain operations and, in some cases, as a deliberate mode of conflict.

Like Hezbollah, al Shabab, and other like-minded contemporaries, the Islamic State exhibits the above characteristics, combined with technological sophistication and a facility for autonomous sustained operations. The hybrid threat concept precedes the Islamic State's emergence by several years, but is not, as many pundits opine, as timeless as war itself. The definition of hybrid threats is implicitly related to the globally de-stabilizing effects of the post-Cold War era that created conditions for their development, coupled with the rapid appearance of disruptive technologies and mass communications media shortly thereafter that offered these nascent groups expansive propaganda networks and novel military tools.

The Middle East and its long history of entrenched ethnic and religious infighting, and muddled political boundaries provide especially fertile ground for the refinement of hybrid threat tactics. Hezbollah, the Lebanon-based Islamic political and militant entity, is perhaps the seminal example of a hybrid threat. Hezbollah emerged in the early 1980s in response to Israeli occupation of Lebanon. From modest beginnings as a paramilitary resistance movement, Hezbollah has evolved to become a sizeable and powerful organization with a large military wing. Hezbollah was among the first modern so-called 'terrorist' organizations to recognize the utility of blended tactics.

During the second Lebanon war of 2006, Hezbollah's distributed cells were often able to repel sophisticated Israeli Army forces by using a mixture of guerilla tactics and modern weaponry. Hezbollah's use of AT-13/14 Anti-Tank Guided Missile Systems achieved modest success against Israel's armored personnel-carriers and Merkava tanks, producing just enough casualties to sustain morale amongst the conventionally overmatched militants and frustrate Israeli advances.

These tactical efforts supported and prolonged Hezbollah's strategic aim to coerce the Israeli government into a stalemate by terrorizing Israel's civilian populations with sustained rocket barrages. In fact, Hezbollah achieved significant campaign-level victories from limited military success by recognizing Israel's need to sustain international legitimacy and its limited threshold for civilian casualties.[ix] By contrast, neither of these considerations limited Hezbollah actions.

Hezbollah's 2006 campaign benefitted greatly from state-sponsored training and provision of advanced weaponry. Access to medium range missiles and modern anti-tank weapons sharply upgraded Hezbollah's ability to counter one of the world's most capable armies.[x] External sponsors and a well-established criminal fundraising network helped sustain Hezbollah's operations. Counterfeiting, smuggling, and credit-card fraud are estimated to generate tens of millions in reliable profits annually as external sponsor funding fluctuates with oil revenues.[xi]

If Hezbollah provides the classic example of a hybrid threat, it is worthwhile to compare the activities of the Islamic State and perhaps expand the definition. Acknowledging previous efforts by a range of US and NATO defense analysts to create a working definition, the authors propose that hybrid threats *simultaneously and adaptively employ a fused mix of conventional weapons, irregular tactics, weapons of mass destruction, terrorism, cyber attacks, and criminal behavior, supported by a malicious information campaign.*

The following six revised hybrid threat characteristics are offered to provide further clarity:

- **Blended Tactics.** Hybrid threats combine conventional military capabilities with small unit guerrilla tactics, asymmetric attacks, and highly mobile standoff engagement systems.
- **Flexible and adaptable structure.** Hybrid threats are generally composed of paramilitary forces that can organize both in massed conventional formations and as small, distributed cells. Hybrid threats create a governance component to establish stability and sustain operations.
- **Terrorism.** Hybrid threats utilize terror campaigns to proliferate hate and despair and to strike fear in adversaries. They target cultural icons and symbols to destroy the identities, heritages, and belief systems that oppose their ideologies.
- **Propaganda and information warfare.** Hybrid threats exploit global communications networks to spread jihadist schemes, raise funds, and recruit.
- **Criminal activity.** Hybrid threats use crime and fundraising as reliable sources of revenue to fight, train, recruit, govern, and sustain operations.
- **Disregard for International Law.** Hybrid threats cynically view international laws as a constraint upon their adversaries that can be exploited.

The following analysis of how the Islamic State fits these six characteristics yields sample suggestions for what offsetting strategies could be employed to defeat them.

Blended Tactics

The Islamic State has the ability to form, deploy, and sustain conventional maneuver forces. They augment this major combat capability with cellular and disruptive tactics to fluidly adapt to changing battlefield conditions and minimize vulnerability to counter-offensives and air strikes. In its summer maneuvers, the IS demonstrated a coherent expansionist strategy as it deliberately isolated beleaguered Iraqi troops in Anbar province and converged on Baghdad from the north and west. The initial incursions into Iraq were characterized by robust conventional firepower and mobility that allowed the IS to rapidly seize and control strategically important urban centers, roads, and terrain.

When the IS advance was stalled by coalition air strikes later this summer, IS militants and equipment melted into urban landscapes, operated at night, and distributed their forces into smaller tactical units, while limiting unsecure cell phone and radio communications.^[xii] They deployed mines and improvised explosive devices to deny mobility and frustrate counter-offensives by Iraqi and Kurdish forces in Tikrit and Jalawla. Mines proved an especially effective means to passively control key areas because they are not vulnerable to airstrikes. Removal requires time-consuming and dangerous clearance techniques carried out by exposed ground troops.

The Islamic State has managed to acquire and use shoulder-fired ground to air missiles to discourage coalition airstrikes. Militants have already shot down at least one Iraqi Mi-35M attack helicopter. Even one lethal takedown a United States Apache might test the US-led coalition's commitment to sustained air campaigns, especially if the IS were to beat rescuers to a crash site and re-create a 'Blackhawk Down' incident.^[xiii] The IS is known to use unmanned drones for aerial reconnaissance and to commandeer captured weapons systems, including US Humvees, artillery, and small arms. They carry out sustained artillery attacks on opposition forces, 'softening' defensive positions before launching disciplined offensives. New evidence indicates that IS militants launched chemical attacks in their October offensive against the Iraqi town of Dhuluiya. Iraqi police claim that the IS detonated improvised explosive devices rigged with chlorine gas cylinders to produce chemical clouds that sickened about 25 soldiers and civilians.^[xiv]

Echoing the concerns of military analysts, former US Secretary of Defense Chuck Hagel described IS 'as

sophisticated and well-funded as any group we have seen.’[xv] In order to overmatch the IS, it is important to understand how their military operations support their overarching strategy. The IS looks to establish a permanent presence akin to statehood, first in the Middle East, but expanding aggressively over time. To achieve this, it is not sufficient to seize territory and destroy adversaries. Their expansionist strategy compels the IS to impose strict governance to subdue opposition, preserve sufficient infrastructure (eg, roads, communications networks, and power generation) to maintain coherent operations, and secure and exploit revenue-generating resources and enterprises.

The first step to stop IS growth and influence in the immediate term is already underway. The Iraqi Army and vetted militant forces like Kurdish Peshmerga must be augmented with foreign air power, military equipment and training, and emergency sustainment to halt the IS advance. The Iraqi Army has been able to push into Sunni-populated areas to relieve besieged forces.[xvi] Since IS fighters now possess advanced weaponry surrendered by the Iraqi Army, the US must similarly equip the Peshmerga with heavier firepower, including armored vehicles, anti-tank weapons, and artillery.[xvii] in addition to rifles, trucks and body armor.[xviii] Activities in the political, economic, and humanitarian sectors should aim to encourage regional cooperation, protect and assist besieged and vulnerable populations, and restrict movements of people and funds to and from IS-controlled areas.

Flexible and Adaptable Structure

The tactical successes of the Islamic State throughout the summer of 2014 can be attributed in part to their distressing ability to absorb and integrate fresh forces, funding, and captured equipment while on the march. Official intelligence estimates of militant numbers range from a core strength of roughly 10,000 that is steadily being augmented by forced enlistments, foreign fighters, and marginalized Iraqi Arab Sunni groups to potentially swell upwards of 50,000.[xix] Leaders of hybrid threat organizations like IS include not only charismatic ideologues, but also pragmatic military officers from deposed regimes or seconded from sympathetic nation-state armies. This combination of charisma and expertise provides the zeal for successful military engagements that appeal to their recruiting base of passionate and disaffected young men and women.

The Islamic State has also established a sustainable operational space. As their military leaders seize territory, the IS simultaneously develops an effective martial governance structure that provides permanence to military operations. Former Iraqi military officers and Hussein-era government officials oversee departments of finance, local governance, public relations, and recruiting designed to consolidate gains and coordinate operations across large areas. By connecting and uniting regional strongholds from the city of Raqqa in northern Syria to key Iraqi cities such as Mosul and Tikrit, the Islamic State is effectively erasing current national boundaries and establishing a functional state.

By all accounts, the IS is a brutal organization whose extreme methods are distasteful even to al Qaeda. Iraqi Sunni insurgent groups, who made up much of the Islamic State’s reinforcements, are most likely to view their alignment with IS as a short-term coalition against a common enemy, namely the present Shia-dominated Iraqi government. The incorporation of local militia groups provides the Islamic State with formed military units that can operate and maintain captured Iraqi and Syrian Army equipment and fight as a disciplined and organized force. As the IS transitions from the offensive into consolidating territorial control, these militias, if sustained, comprise a defensive force dedicated to protect their homeland and backed by a sympathetic civilian populace.

Any strategy to counter IS must uproot their strongholds by isolating and destroying hardcore adherents while providing viable alternatives and a well-communicated plan for safe reconciliation to groups who have aligned with IS out of terror or despair. These are not military endeavors, but rather require

representative and legitimate local governance, education, and clear and realistic options that offer hope, stability, and prosperity as a compelling counter-offer to the ruthless imposition of ideological control proffered by the Islamic State. Disenfranchised Sunni leaders have already indicated that they might be cajoled to reject the IS in favor of adequate representation and longer-term economic and security concerns.[xx] Investment in Iraqi agriculture would provide much needed jobs for the IS recruiting base of ‘mostly young men between the ages of 16 and 25 who are primarily poor, unemployed and lack an education.’[xxi]

Terrorism

Within their sphere of control, the Islamic State uses cruel acts of terrorism to subdue local populations and proliferate hate propaganda. Their brutal method of conquest is familiar in the taking of towns, where fighters destroy Shiite shrines, execute resisters, overrun security forces, and hoist the IS black flag above government buildings.[xxii] Foreign humanitarians and journalists are preferred targets for highly publicized beheadings intended to scare Westerners out of Iraq and Syria.[xxiii] Meanwhile Yazida and Chaldean Christian minorities are targeted in genocidal campaigns that include crucifixions, stonings, and public massacres inflicted against over 4000 victims.[xxiv]

Not content with mass killings, the IS also targets cultural icons and religious centers with an aim to eradicate entire societies. In July, they destroyed the tomb of the prophet Jonah, an important and beloved figure in Jewish, Christian, and Islamic religious traditions. In addition to demolishing churches, shrines, and mosques, historical treasures including priceless artifacts, statues, and archeological digs are purposefully destroyed with an aim to obliterate symbols that represent a sense of shared heritage.[xxv]

These wanton acts of violent and destructive evil should galvanize the world to unite against IS. As US Secretary of State John Kerry noted, these atrocities are “a purposeful final insult, and another example of [the IS’] implacable evil.” [xxvi] International resolve must be equally purposeful. Forceful rhetoric must be backed with committed and sustained efforts to discredit the IS and expose the malevolence behind their vitriolic propaganda and audacious acts of terrorism. A zero-tolerance approach should aim at denying sanctuary and financing, while vigorously pursuing and prosecuting terrorist acts. A united ‘no negotiations’ policy may not be achievable, but any discussions with IS terrorists must be narrowly focused on de-escalation, disarmament and reconciliation.[xxvii] The only way to eradicate terrorism long-term is by forcing generational changes. Tens of thousands of displaced populations in Iraq and Syria have witnessed extreme violence, lost loved ones, and endured starvation and persecution for much of their lives.[xxviii] These populations must be persuaded that there are compelling reasons to break the cycle of hate and revenge and strive for peace. Military leaders must be cognizant of the longer-term effects of tactical actions, and provide secure space for humanitarian and developmental agencies to provide relief, education, and hope for exposed groups. This task, though daunting, is not impossible. The children of today’s terrorists need not be condemned to the same path due to despair, poverty, or desire for revenge.

Propaganda and Information Warfare

Organizations such as Hezbollah, Boko Haram, al Shabab, and the Islamic State utilize entrenched hatreds, audacious public ultimatums, and diplomatic double-speak to provoke regional and international tensions. They show an ironic ability to denounce Western ideals through the same media tools that are typically associated with the modern popular culture they profess to despise. IS has proven particularly adept at using social media including YouTube, Twitter, and blog posts for plotting, recruitment, fundraising, and marketing. Their propaganda campaigns provide near-real time footage of victorious militants hoisting their black flags and patrolling newly conquered towns as they subjugate vanquished foes through fear and humiliation.

The Islamic State makes powerful use of professionally developed propaganda films to illustrate their resolve and paint their fighters as heroes. They use nuanced messaging to market their professionalism and discipline. Glossy videos of militants firing machine guns and rocket-propelled grenades in relentless assaults on major cities are aimed to wither opposition and rally new recruits to the cause. Footage of well-trained IS fire teams in tactical formations gaining ground house-by-house with coordinated artillery support in Kobane cast doubts on the effectiveness of coalition air strikes and aim to weaken the resolve of Kurdish defenders.[\[xxix\]](#)

Islamic State propaganda has also generated support from farther abroad. Foreign fighters, including North Americans and Europeans, are often radicalized through sophisticated web-based campaigns. Well-scripted video clips feature jihadists from as far abroad as Australia and Kosovo who profess allegiance to the IS and provoke global leaders with audacious threats. Meanwhile, teenage girls from Austria and even the United States are lured to support the cause as jihadist wives through aggressive social media campaigns.[\[xxx\]](#) The impact of foreign fighters comes not from their relatively small numbers, but the sense of global reach their recruitment implies. When a jihadist with a British accent beheads an innocent journalist or an American citizen-turned-insurgent is killed in Syria, it is hard not to recognize the Islamic State as an internationally relevant organization.[\[xxxi\]](#)

The international community has thus far approached the so-called ‘war of the narrative’ rather cautiously. While politicians condemn the raw brutality of IS actions, there has been a notable lack of a positive and sincere counter-message. Western onlookers have grown de-sensitized to images of violence against civilians in faraway lands. Moreover, distrust of Muslim communities in Europe and North America has risen sharply in the wake of recent extremist attacks. Even Canada, long-heralded as the Western bastion of peace and tolerance, now regards its own Muslim citizens with caution, with polls indicating that over half of Canadians feel that Muslims could be trusted “a little” or “not trusted at all.” These negative sentiments have arisen despite the National Council of Canadian Muslims’ staunch condemnation of the Islamic State and appeals for solidarity in “upholding and protecting the safety and security of our country.”[\[xxxii\]](#)

At the [Wales Summit](#) in September, NATO issued strong rhetoric expressing outrage at the Islamic State’s “barbaric attacks” against civilians and “deliberate targeting of entire religious and ethnic communities.”[\[xxxiii\]](#) Condemnation has not translated into unified action, however. The notable lack of coherent commitment to thwart the IS advance to NATO’s southern flank in Turkey reveals sharp national divides among member states regarding the appropriate Alliance response. Yet the raw brutality of IS actions are beginning to work against them. The global community found its voice in the universal condemnation of the recent beheadings of Alan Henning, James Foley, and others. The plainspoken, yet gripping entreaties for mercy from the victims’ family members resounded across cultures and belief systems. It remains only for the global community that opposes the Islamic State to continue to expose their dark ideology and find, communicate, and deliver a positive and just alternative.

Criminal Activity

The Islamic State has become one of the world’s most wealthy terror groups by cultivating a self-sufficient shadow economy based on extortion, organized crime, and illicit oil sales. Cities under Islamic State control look more like fiefdoms than occupied zones. Minority groups pay tributes in an organized extortion system for the dubious privilege of residing or doing business in IS-administered areas.[\[xxxiv\]](#) The IS likewise controls the sale of commodities such as oil, wheat, and purloined artifacts within its territories. An assortment of shady businessmen conduct regular business trafficking in IS gray-market goods throughout the region. The IS produces an estimated 50,000 barrels a day from oil fields it controls although the effect of US led airstrikes is unclear.[\[xxxv\]](#) Even at discounted black market rates of \$20 to

\$30 a barrel, IS can clear over \$1 million a day selling oil to its enemies.

Donations further bolster the IS shadow economy, although Saudi Arabia and the United Arab Emirates have initiated aggressive crackdowns on terrorist financing. The United States is attempting to influence national policies in Qatar and Kuwait that create 'permissive environments' for financing terrorists.[\[xxxvi\]](#) The Islamic State has generated over \$20 million in ransoms this year. [\[xxxvii\]](#) Even though national laws in the US and UK explicitly prohibit payments to terrorist organizations, others, including NATO Allies Spain and France, have discreetly used ransom payments to negotiate the release of their people.[\[xxxviii\]](#)

Efforts must be re-doubled to strangle Islamic State cash flows. Coalition strategies should focus on limiting oil production, transit, and sales, while remaining cognizant of the impact on local civilians that are dependent on oil the Islamic State produces and provides to run their generators, heat homes, and sustain industry.[\[xxxix\]](#) Turkey is attempting to block the movement of illicit oil, but concedes that their long and porous border is 'difficult to police.'[\[xl\]](#) Western countries in particular need to develop a hardline and consistent approach that recognizes that the horrific acts that have been inflicted on captured foreigners are supported every time hostage takers profit from hefty ransoms. International law should address terrorist financing, including purchases of illicit commodities and ransom payments, as a potentially criminal offense.

Time will also take its toll on IS criminal activities and funds. Without adequate technical training or maintenance to sustain operations, outputs at IS-controlled oilfields should decline sharply. The costs of governing its conquered territories including public worker salaries and provision of services like sanitation, power, and water divert funds from military and terrorist activities. Payments to militants, mercenaries and bribes to local leaders are also required to sustain the IS war machine. As revenues shrink and military gains become less certain, the IS will find funding their ambitious agenda to be increasingly problematic. If public dissent grows from oppressive governance and a lack of basic services, the balance between administering occupied territories and conquering new ones will seem more and more like a zero sum game.

Disregard for International Law

The Islamic State shows a complete disregard for internationally accepted laws and universal humanitarian rights. Mass executions of minority groups have become distressingly commonplace. In one tragic example, after the Islamic State captured the city of Sinjar in northern Iraq, they massacred up to 500 Yazidi civilians and enslaved some 3000 Yazidi women.[\[xli\]](#) Non-Muslim women and girls are brutalized under the IS-sanctioned practice of jihad-al nikah, or "sex in the name of the struggle." They are raped, enslaved, and sold into forced pairings with militants. [\[xlii\]](#)

The IS brazenly advertises atrocities as a tactical deterrent. Even fellow Sunni Arabs are not exempt from intimidation. Public executions and discoveries of mass graves of over 200 members of the Sunni Albu Nimr tribe near the Iraqi city of Hit delivered a stark warning to other Sunni clans.[\[xliii\]](#) The IS reputation for brutality has provoked such fear that numerically superior Iraqi forces fled confrontations without a fight, abandoning strategically important areas, functional military equipment, and vulnerable populations as war trophies for IS militants.[\[xliv\]](#) Once it seizes territory, the IS imposes order through violent oppression and terror. Their extreme interpretation of Sharia law includes stoning, amputations, and the complete sequestering of women.

The Islamic State's disdain for international law and its criminal activities provide incentives for unified international action. Yet to date, Arab signatory nations to the [Universal Declaration of Human Rights](#) have remained surprisingly silent in the face of what amounts to a humanitarian catastrophe. Former US Ambassador and UN Assistant Secretary General Peter Galbraith has pointed out the global community's

obligation to intervene on behalf of threatened populations. In congressional testimony, Galbraith recommended countering IS inhumanity and criminality by officially and legally recognizing their campaigns against minority civilian populations as acts of genocide.

The broader Muslim community also has a role to play in exposing the criminality of the Islamic State's actions. Islamic State extremists use loose interpretations of the Koran to justify cold-blooded massacre of innocents, criminal extortion, and torture in their bid to establish a transnational Islamic caliphate under a distorted rendition of Sharia law. Muslim scholars from around the world have united in denouncing these "un-Islamic" acts in an [open letter](#) with detailed religious arguments aimed to discount IS claims to represent 'true' Muslims.^[xlv] This is an important first step toward recognizing radicalism as reprehensible and criminal within the broader Islamic community.

Implications

The Islamic State is a formidable, but not unassailable hybrid threat. The danger the Islamic State poses to the international order warrants further examination of their objectives, capabilities, and vulnerabilities in a concerted framework. Analysis of the six characteristics of the hybrid threat yields tacit suggestions to be explored, expanded and employed in a whole of government approach. Armed with a resolute international response, solutions to the rise of the Islamic State include regionally-led military counter-offensives, closure of borders, disruption of financing, prosecution of atrocities, protection of persecuted minorities and prevention of mass media exploitation for recruiting and training. Actions range across strategic and tactical dimensions from seizing of financial assets to limiting the movement of extremists.

Generations of mutual mistrust, misguided hate, and exploitation are the genesis for popular support of groups like the Islamic State. A coherent campaign is required that not only destroys their military capability, but also their regional credibility, sources of funding, and ideological allure while offering legitimate and attainable alternatives for populations susceptible to radicalization. The hybrid threat known as the Islamic State will inevitably thrive if we collectively fail to reconcile legitimate grievances, provide reasonable opportunities to live and prosper, and encourage new models of government that guarantee basic human rights while respecting prevailing cultural norms.

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About the Authors



Scott Jasper

Scott Jasper, CAPT, USN (ret) is a lecturer in the Center for Civil-Military Relations and the National Security Affairs Department at the Naval Postgraduate School. He designs and delivers resident and mobile courses on Defense Capability Development and Cyber Security. He is the editor of *Conflict and Cooperation in the Global Commons*, *Securing Freedom in the Global Commons*, and *Transforming Defense Capabilities: New Approaches for International Security*. He is a PhD candidate at the University of Reading in the United Kingdom.



Scott Moreland

Scott Moreland is deputy program manager for multinational exercises in the Center for Civil-Military Relations at the Naval Postgraduate School. In addition, he lectures on peacekeeping, foreign disaster assistance, defense transformation and international civil-military relations. His current areas of research include the global commons and comprehensive approach to crises.

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